

**Monthly Report to the Special Trustee
Office of Trust Records
November 2000**

Following are highlights of records management activities performed by the Office of Trust Records during November 2000.

STAFFING

- ❖ **Management Analyst positions** (research, develop, and implement records management policies, retention schedules; training curricula and aids, etc.)
 - One supervisory position to be classified and advertised
 - One GS-13 position vacant; recruitment action underway
- ❖ **Records Management Specialist positions** (implement records management program, BIA disposition backlog, records cleanup, etc.)
 - Recruitment action underway for two vacant positions; vacancy announcement closed 11/30/00
 - Recruitment action underway for one position in Electronic Records Division
- ❖ **Archives Technicians positions** (search for re-filed or interfiled records; receive, move, and shelve records; inventory records)
 - Recruitment action initiated for one vacant position
- ❖ **Materials Handlers positions** (receives, stages, and ships records, boxes, equipment; performs manual labor duties)
 - Selection made for one vacant position
 - Selection for two vacant positions pending
- ❖ **Administrative support positions** (provide clerical and administrative operations support to records staff)
 - Recruitment action initiated for vacant office automation clerk position
- ❖ **Computer Specialist positions** (analyze, develop, and implement information technology solutions; manage projects to implement electronic records programs for BIA and OST)
 - Computer specialist position being re-advertised
 - Supervisory Computer Specialist position to be classified and advertised

TRAINING

- ❖ **IARM:**
 - Federal Records Management training— 2 employees
 - Basic Records Operations— 4 employees
 - Transferring and Reference Services— 4 employees
 - COTR Inspection Workshop— 3 employees

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❖ **BIA:**

- Basic Records Management training provided in Denver to employees from various BIA locations— 21 employees
- Mid-level management records awareness briefings presented to employees at the following BIA locations:
 - Puget Sound Agency—17 employees
 - Northern Idaho Agency—12 employees
 - Fort Hall Agency—14 employees
 - Seminole Agency— 3 employees
 - Choctaw Agency— 7 employees
- Records management presentation made at the BIA National Line Officers Meeting—approximately 100 employees
- Records management presentation made at OTFM Managers' Retreat approximately 35 employees

CONTRACTORS

- ❖ **Iron Mountain Records Management Services**— prepare records for transfer to Federal Records Center or local storage facility for cleanup
 - Fort Berthold— 240 boxes to Albuquerque
 - Ft. Belknap— 370 boxes to Lee's Summit
 - OTR (Hawkins)— 280 boxes prepared for local and Federal Records Center storage
- ❖ **G&G Advertising**— completed two technical leaflets
- ❖ **Bradson Corporation**— in-service training for vital records scheduled for January 2001
- ❖ **Native American Industrial Distributors**— on-going assistance provided with project management

OTHER WORK

- ❖ **Disposition Backlog at BIA Locations**
 - Worked with BIA locations to approve and transfer records to Federal Records Centers
 - Southwest Region— 36 boxes
 - Visited the following BIA locations to assess current records storage requirements, inactive records disposition backlogs, and records transfer to appropriate storage facilities (site visit reports attached)
 - Puget Sound Agency
 - Northern Idaho Agency
 - Plummer Field Office

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- Fort Hall Agency
 - Seminole Agency
 - Choctaw Agency
- ❖ **Develop and Issue BIA/OST Records Manuals, Training Aids and Provide Technical Assistance**
- Published two records technical leaflets
 - "Managing Electronic Mail"
 - "Personal Papers"
 - Provided ongoing technical assistance to BIA regional and agency office locations
- ❖ **Award New Contract for OST Imaging**
- Contract awarded to ITQ LATA for the "Daily Work" portion of the requirement
 - Contract awarded to CD&L for technical assistance and quality assurance activities
- ❖ **Complete Plan to Comply with Electronic Records Requirement**
- Continued to work with the BIA's Office of Information Resources Management supporting their project to inventory computer data tapes
- ❖ **Complete Submission of Records Control Schedules to NARA**
- Collected and compiled records survey information received from BIA agency locations
- ❖ **Establish Pilot Project for Electronic Record Keeping**
- Working with OTFM and TREEV to schedule meeting in Albuquerque to review and finalize design document for the Fax Capture Project
- ❖ **Begin Cyclic Evaluations of Records Programs**
- Conducted records program evaluations at the following BIA locations
 - Puget Sound Agency
 - Northern Idaho Agency
 - Plummer Field Office (no evaluation questionnaire completed)
 - Fort Hall Agency
 - Seminole Agency
 - Choctaw Agency